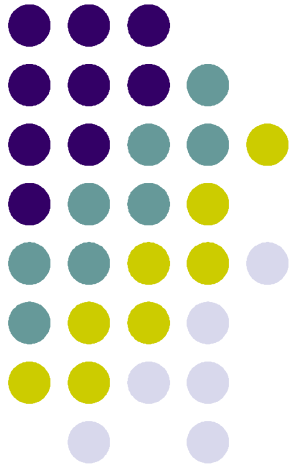
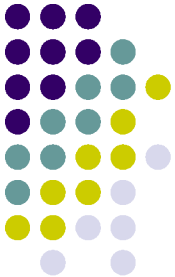
Bootstrapping

Steve Muckle

Dave Eckhardt

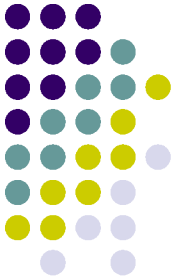


Synchronization



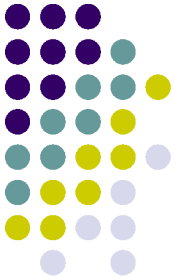
- Checkpoint 1
  - Wednesday, 5207
  - Look for mail
  - You must attend (unless you make arrangements Tuesday)

Synchronization



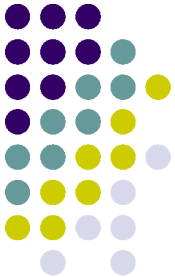
- Who uses...?
  - Andrew 52xx Linux boxes? Full?
  - West Wing Linux boxes? Full?
  - Personally owned machine?
  - Crash box?
- Simics on cycle servers
  - Please limit yourself to 1 simics on 1 machine
- Partner reminder
  - If P2 was troubling, and P3 isn't improving, see us

Motivation



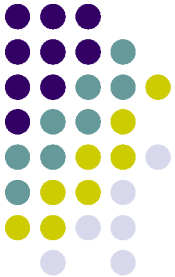
- What happens when you turn on your PC?
- How do we get to main() in kernel.c?

Overview



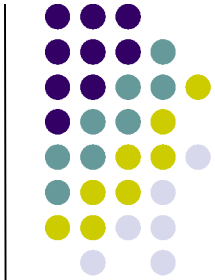
- Requirements of Booting
- Ground Zero
- The BIOS
- The Boot Loader
- Our projects: Multiboot, OSKit
- BIOS extensions: PXE, APM
- Other universes: “big iron”, Open Firmware
- Further reading

Requirements of Booting



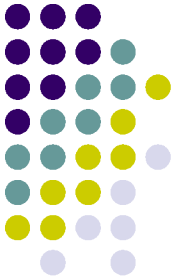
- Initialize machine to a known state
- Make sure basic hardware works
- Inventory hardware
- Load a real operating system
- Run the real operating system

Ground Zero



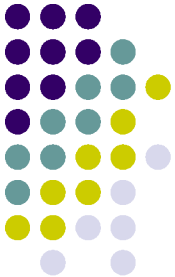
- You turn on the machine
- Execution begins in real mode at a specific memory address
  - Real mode - primeval x86 addressing mode
    - **Only 1 MB of memory is addressable**
  - First instruction fetch address is 0xFFFF0

Ground Zero



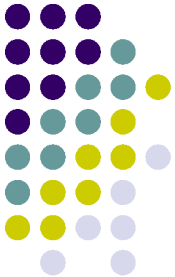
- You turn on the machine
- Execution begins in real mode at a specific memory address
  - Real mode - primeval x86 addressing mode
    - **Only 1 MB of memory is addressable**
  - First instruction fetch address is 0xFFFF0
    - **“End of memory” (20-bit infinity), minus 4**
    - **Contains a jump to the actual BIOS entry point**
      - Great, what’s a BIOS?

Basic Input/Output System (BIOS)



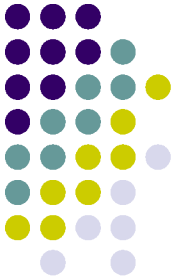
- Code stored in mostly-read-only memory
  - Flash (previously EEPROM, previously EPROM)
- Configures hardware details
  - RAM refresh rate or bus speed
  - Password protection
  - Boot-device order
- Loads OS, acts as mini-OS
- Provides some device drivers to real OS

BIOS POST



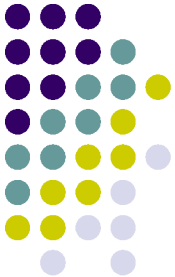
- Power On Self Test (POST)
- Scan for critical resources
  - RAM
    - **Test it (only a little!)**
  - Graphics card – look for driver code at 0xC000
  - Disk – look for driver code at 0xC8000
  - Keyboard
- Missing something?
  - Beep

BIOS Boot-Device Search



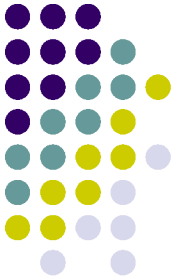
- Consult saved settings for selected order
  - “A: C: G:” (maybe PXE)
- Load the first sector from a boot device
  - Could be a floppy, hard disk, CDROM
  - Without a BIOS, we’d be in a bit of a jam
- If the last two bytes are AA55, we’re set
- Otherwise look somewhere else
  - If no luck, strike terror into user's heart:
    - **“No Operating System Present”**

BIOS Boot-Sector Launch



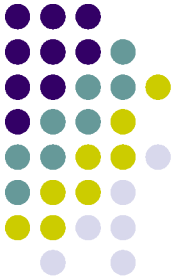
- Boot sector is copied to 0x7C00
- Execution is transferred to 0x7C00
- Extra step for hard disk or CD-ROM
  - Boot sector (“MBR”) knows about partitions
    - **BIOS starts it running at 0x7C00, of course**
    - **Copies itself elsewhere in memory, jumps there**
    - **Loads “active” partition's boot sector at 0x7C00**
- Now we’re executing the boot loader – the first “software” to execute on the PC

Boot Loader



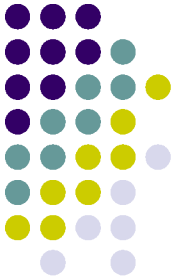
- Some boot loaders designed to load one OS
- Others give you a choice of which to load
- Some are small and have a simple interface
  - “F1 FreeBSD F2 Windows”
- Some are large, contain GUI, shell prompt
- We use GRUB
  - http://www.gnu.org/software/grub/

Boot Loader's Job



- Mission: load operating system
- From where?
  - “/boot/kernel.gz” is easier said than done!
  - May need to understand a file system
    - **Directories, inodes, symbolic links!**
  - May need to understand *multiple* file systems
    - **Single disk may contain more than one**
    - **Layout defined by “partition label”**
      - ...and “extended partition label”

Boot Loader's Job



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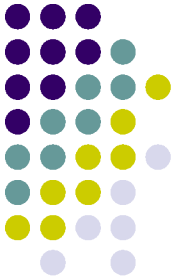
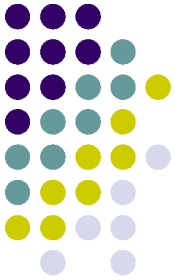
      - ...and "extended partition label"
- But...but...boot loader is 510 bytes of code!

Multi-Stage Boot Loader



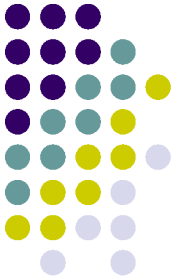
- GRUB is larger than one sector
- First sector, loaded in by the BIOS…
  - ...just loads the rest of the boot loader
    - **“GRUB Loading stage2”**
- GRUB then presents boot menu
- The OS-load challenge
  - BIOS runs in real mode – only 1 meg of RAM!
  - OS “may be” larger than 1 meg
    - **Linux – often; Windows – absolutely!**

Brain-Switching



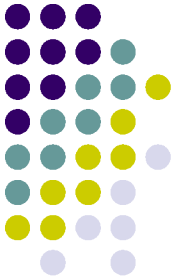
- Switch back and forth between real and protected mode
  - Real mode: BIOS works, provides disk driver
  - Protected mode: can access lots of memory
- Switching code is tricky
  - Somewhat like OS process context switch
  - Roughly 16 carefully-crafted instructions each way
- Load done ⇒ jump to the kernel's entry point
  - How do we know the kernel's entry point?

Entry Point, Binary Format, ...



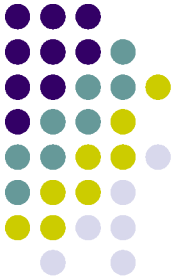
- Can't we just jump to the first byte?

Entry Point, Binary Format, ...



- Can't we just jump to the first byte?
- Probably not
  - If kernel is a “regular executable” it begins with an “executable file header” (e.g., ELF)
  - If the OS has the concept of “BSS”, the zeroes aren't in the file...
- Loading the bytes into RAM isn't enough
  - We must understand, mutate them

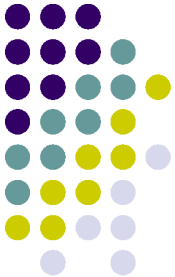
Multiboot Specification



- Attempt to define “portable kernel format”
- Multiboot “standard”
  - Binary specifies entry point &c
- The multiboot header must be located in the first 8192 bytes
- This is the mysterious multiboot.o…

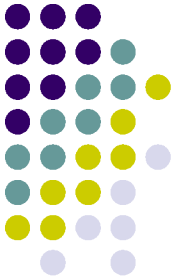
0x1badb002
flags
checksum
header_addr
load_addr
load_end_addr
bss_end_addr
entry_addr

410 “Pebbles” (from OSkit)



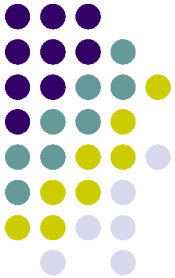
- Entry point is asm function in multiboot.o
- This calls the first C function, multiboot_main

OSkit



- multiboot_main() calls:
  - base_cpu_setup(): init GDT, IDT, and TSS
  - base_multiboot_init_mem(): init LMM
  - base_multiboot_init_cmdline()
    - **parse command line passed to kernel by boot loader**
  - kernel_main() (at last, your code!)
  - printf(), if kernel_main() ever returns
    - **...kernel main returned with code %d...**

PXE

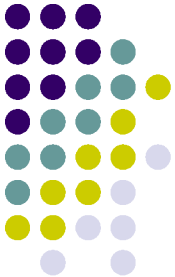


- Preboot Execution Environment
- "How a PC should net boot"
  - DHCP protocol extensions to say
    - **"I am a PXE client of DHCP"**
    - **"My machine ID is ... my hardware type is ..."**
  - DHCP server assigns IP address
    - **Instructs client: network settings, TFTP server, file**
  - Client downloads 2nd-stage boot via TFTP
- PXE libraries for downloaded loader to use
  - Ethernet, UDP, TFTP

APM

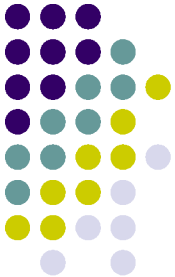
- Advanced Power Management
- Problem – Laptop hardware is “special”
  - Lots of power-critical hardware
  - Totally different from one machine to another
    - **Disk spin-down (“standard”, so may be fairly easy)**
    - **Display backlight, processor speed (not so easy)**
    - **South bridge, DRAM controller, keyboard...**
      - Sequencing these in the right order is *very* machine-specific
- Problem – user does things (close lid...)

APM



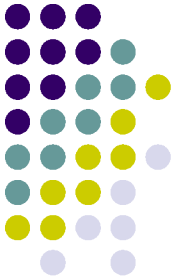
- Solution - “power kernel”
  - OS asks it to control power hardware
  - Power hardware tells OS about events
    - **Lid closed**
    - **Battery low**
- Complex rules for messaging back and forth
  - OS required to poll APM periodically
    - **May involve switch to 16-bit mode**
  - Suspend protocol: prepare/commit/abort...

ACPI



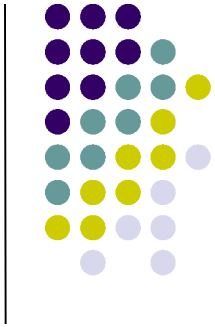
- Advanced Configuration & Power Interface
  - APM's “big brother”
- Good news
  - OS gets more understanding, control
  - BIOS provides ACPI code to OS in virtual-machine format

ACPI



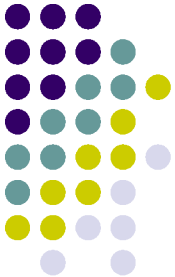
- Bad news – implementation
  - What the BIOS tells you is often wrong
    - **Many "on this machine, patch this to that" fixes necessary**
    - **FreeBSD kernel contains "BIOS blacklist"**
      - Strings identifying BIOS versions known to have fatal ACPI bugs
    - **ACPI virtual-machine code often depends on being run by one particular virtual machine**
    - **ACPI "OS-independent" virtual machine code checks which OS is executing it and behaves differently(!!)**

ACPI



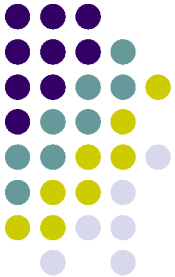
- Bad news – structural
  - Interaction between ACPI and other code is delicate and fraught with peril
    - **Should VGA BIOS “reset” be called before or after restoring ACPI video state?**
- Bad news – throw weight
  - Specification pages
    - **1.0 = 400**
    - **2.0 = 500**
    - **3.0 = 600**

“Big Iron” (mainframes)



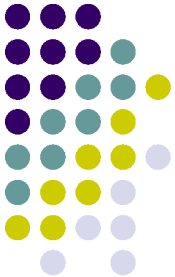
- “Boot loader” may be a separate machine
  - When main CPU powers on, it does not run code!
  - “Front-end processor” tasks
    - **Run thorough diagnostics on main machine**
    - **Store OS into its memory**
    - **Set its program counter to entry point**
    - **Turn on instruction fetching**
- “Front-end” also contains a debugger
  - Useful when your OS crashes

Open Firmware



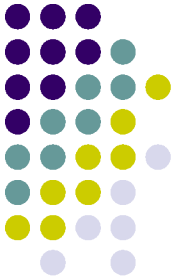
- Sun & Mac hardware (until June 2005, sigh)
- Goal: share devices across processor families
  - Ethernet, SCSI disk controller, ...
- Solution
  - Processor-independent BIOS modules on cards
  - Collection of FORTH methods
    - **test, boot, open, close, read, write, etc.**
- “Boot ROM” may contain a small debugger
  - Sun, Mac do this... PCs are just starting to catch up

EFI



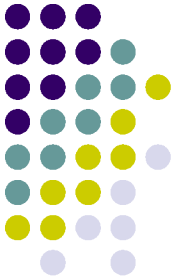
- “Next big thing” in the PC world
  - Including PC's made by Apple(!?)
- “Super sized”: #partitions, partition labels, ...
- More device drivers (not just disk, video)
  - May be signed, certified, protected
- Arriving mostly with x86-64 machines
- Many more interfaces, larger interfaces
  - Spec pages: EFI 1.10 = 1100, UEFI 2.1 = 1682, ...
  - EFI+ACPI: 2300 pages of fun for the whole family

Summary



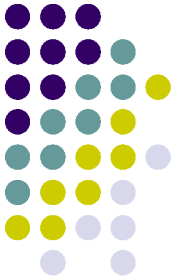
- It's a long, strange trip
  - Power on: maybe no RAM, maybe no CPU!!
    - **Maybe beep, maybe draw a sad face**
  - Locate OS
  - Load N stages
  - Tell kernel about the machine and the boot params
  - Provide support to kernel once it's running

Further Reading



- More BIOS details
  - http://www.pcguide.com/ref/mbsys/bios/bootSequence-c.html
  - http://bioscentral.com/
- A real memory tester - memtest86.com
- Open-source BIOS!
  - www.linuxbios.org
  - openbios.info
- PXE ftp://download.intel.com/labs/manage/wfm/download/pxespec.pdf

Further Reading



- ACPI
  - http://www.acpi.info
- EFI
  - http://www.uefi.org
  - (old) http://www.intel.com/technology/efi/